

**1A Anthony Barrera and Gabriel Benito Barrera (GUARD/P)**  
**Case No. 03CEPR01548**

**Petitioner** Kenda Bouhaben (pro per)  
**Attorney** Zepure "Zeppy" Attashian (for Ramona Gonzales – Objector/Guardian of Anthony)

**Petition for Termination of Guardianship**

		<b>KENDA BOUHABEN</b> , mother, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>RAMONA GONZALES</b> , maternal grandmother, was appointed guardian of Anthony Barrera on 04/05/04. – served by mail on 11/23/15.	<b>This petition pertains to ANTHONY only.</b>
Cont. from 012516, 021816, 032416, 050516		Please see petition for details.	<b><u>Continued from 5/5/16</u></b> <b>Minute Order states</b> the Court advises that it can only make visitation orders as to Anthony upon termination of the guardianship. Ms. Attashian represents that the parties have agreed to keep the guardianship of Anthony in place at this time. 60 days is requested to allow time for filing in Family Court as to visitation.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	<b>Objection to Termination of Guardianship</b> filed 12/31/15 by Ramona Gonzales	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	<b>Court Investigator filed a report on 02/05/16</b>	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	<b>DSS Social Worker filed a report on 02/16/16.</b>	
<input checked="" type="checkbox"/>	Aff.Mail	<b>Proposed Stipulation Regarding Guardianship and Visitation of Anthony Barrera and Gabriel Barrera filed on 5/3/16.</b>	
	W/		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			<b>Reviewed by:</b> JF/KT
			<b>Reviewed on:</b> 7/25/16
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 1A- Berrera &amp; Barrera</b>

**1A**

Attorney Heather H. Kruthers (for Public Guardian, Trustee)

**Fourth and Final Account and Report of Trustee; Petition for Allowance of Compensation to Trustee and Her Attorney; Termination of Trust; and Distribution**

<b>DOD: 7/27/2015</b>		<b>PUBLIC GUARDIAN</b> , Trustee, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Note:</b> Court records show a filing fee of <b>\$200.00</b> rather than <b>\$435.00</b> was paid on 6/16/2016 for the filing of the instant Fourth Account. Proposed order has been interlineated to reflect the correct sum for approved fees and costs as <b>\$1,157.68</b> , and that distribution of the remaining sum of <b>\$10,088.38</b> shall be made to the department of Health Services.
<b>Cont. from</b>		<b>Account period: 10/6/2015 – 5/27/2016</b>	
		Accounting - <b>\$33,332.84</b>	
		Beginning POH - <b>\$33,332.60</b>	
		Ending POH - <b>\$11,246.06</b> (all cash)	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
		Trustee - <b>\$332.68</b> (1.75 staff hours at \$76/hr and 2.08 Deputy hours @ \$96/hr)	
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>	Attorney - <b>\$625.00</b> (less than per Local Rule)	
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	Costs - <b>[\$200.00]</b> (filing fee)	
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>		<b>Petitioner states:</b> The only asset in the Trust is cash of <b>\$11,246.06</b> ; the Department of Health Care Services (MediCal) submitted a claim for reimbursement of <b>\$1,341,602.44</b> ; after payment of court-ordered fees, commissions and partial payment of the MediCal claim, there will be no assets remaining to distribute to the Beneficiary's heir.	
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>		<b>Petitioner prays for an Order:</b>	
<b>9202</b>		1. Terminating the Trust due to the Beneficiary's death;	
<input checked="" type="checkbox"/>	<b>Order</b>	2. Approving, allowing and settling the Fourth and Final Account;	
<b>Aff. Posting</b>		3. Authorizing the Trustee and attorney fees and compensation; and	
<b>Status Rpt</b>		4. Authorizing distribution of <b>[\$10,088.38]</b> to the Department of Health Services.	
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			

<b>Reviewed by:</b> LEG
<b>Reviewed on:</b> 7/22/16
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 2- Soto</b>

## Probate Status Hearing Re: Filing Receipt of Blocked Account

			<b>STEVEN R. THOMAS</b> , Trustee, filed a Petition for Settlement of First and Final Account, Approval of Trustee Acts and Distribution of Trust Assets and Attorneys' Fees and Costs on 3/28/16.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>1. Need Receipt and Acknowledgment of Order for the Deposit of Money into Blocked Account (MC-356) for the six (6) minor heirs or written status report per Local Rule 7.5.</b>
			The petition was granted on 6/16/16 and the Court set this status hearing re filing receipts for blocked accounts of the six (6) minor beneficiaries.	
			Orders to Deposit Money into Blocked Accounts were filed 6/16/16 for each minor heir.	
<b>Aff.Sub.Wit.</b>				
<b>Verified</b>				
<b>Inventory</b>				
<b>PTC</b>				
<b>Not.Cred.</b>				
<b>Notice of Hrg</b>				
<b>Aff.Mail</b>				
<b>Aff.Pub.</b>				
<b>Sp.Ntc.</b>				
<b>Pers.Serv.</b>				
<b>Conf. Screen</b>				
<b>Letters</b>				
<b>Duties/Supp</b>				
<b>Objections</b>				
<b>Video Receipt</b>				
<b>CI Report</b>				
<b>9202</b>				
<b>Order</b>				
<b>Aff. Posting</b>				
<b>Status Rpt</b>				
<b>UCCJEA</b>				
<b>Citation</b>				
<b>FTB Notice</b>				
			<b>Reviewed by:</b> skc	
			<b>Reviewed on:</b> 7/25/16	
			<b>Updates:</b>	
			<b>Recommendation:</b>	
			<b>File 3- Thomas</b>	

**Probate Status Hearing RE: Visitation**

		<p><b>EVONIESHA SMITH</b>, mother, petitioned the court to terminate the guardianship. Minute order dated 12/3/16 denied the petition for termination. This status hearing was set re: visitation.</p> <p><b>ADRIANA BREWER</b>, non-relative, was appointed guardian on 9/11/14. – present in court on 4/23/15.</p> <p><b>Minute order dated 4/23/15 states</b> the Court states its intent to give Ms. Smith the opportunity to establish more regular and frequent visitation. The Court orders visitation for Ms. Smith on the first weekend of the month, from Friday at 1 p.m. thru Sunday at 1 p.m. Ms. Smith is to pick the minor up at Adriana Brewer's home, and Ms. Brewer is to pick the minor up from Ms. Smith's home. Parties may mutually agree to an alternative weekend and are admonished to obey these orders.</p> <p><b>Declaration of Evoniesha Smith filed on 7/31/15 states</b> she has done all her visits with her daughter like the judge ordered her to. She has attached proof of the visits and pictures of Kylie with her brother, sisters and mother.</p> <p><b>Minute order dated 8/20/15 states</b> the Court orders visitation increased to every other weekend, beginning 8/25/15, from Friday at 2 p.m. thru Sunday at 2 p.m. Parties are to meet in Bakersfield at the bus depot to exchange the minor.</p> <p><b>Please see additional page</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 6/16/16. Minute order states</b> the Court will consider terminating the guardianship at the next hearing. Both parties are to file a proposal for visitation with the guardian if the guardianship is terminated. The Court Investigator is ordered to speak with the child.</p>
<b>Cont. from 082015, 120315, 061616</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<p><b>Reviewed by: KT</b></p> <p><b>Reviewed on: 7/25/16</b></p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 4 – Smith</b></p>	

**Court Investigator Report filed on 6/14/16**

**Proposal of Adriana Brewer re Visitation filed on 7/19/16** requests every weekend or every other weekend visitation with Kylie. She would like for the meeting place to be in Bakersfield at 6:30 like they have been doing. Ms. Brewer would also like for them to split all holidays including birthdays and school vacation time. She would also like to take part in all school activities as well.

Ms. Brewer would like the court to take into consideration the pros and cons of such a drastic change in regards to Ms. Smith's request to gain full custody and giving her one weekend a month. If Kylie were to relocate to Ms. Smith's care Ms. Brewer believes it would do more harm than benefit being she has been her maternal support and provider since 6 months of age.

**Proposal of Evoniesha Smith filed on 7/25/16** states once she gains full custody of her biological daughter, Kylie she is willing to give Adriana Brewer visitation rights, including the following:

Adriana Brewer can visit Kylie every second weekend of each month. Ms. Brewer can only pick up Kylie after 3 p.m. on every second Friday afternoon and drop her back to the residence of Evonisha Smith by 5 p.m. on Sunday. Ms. Brewer must inform Ms. Smith in advance if she has any difficulty to be on time.

In addition, she and Ms. Brewer will discuss and have a mutual agreement to alternate holidays and Kylie's birthday arrangement.

**5A Earl Manoid Robinson (Estate)****Case No. 14CEPR00563****Attorney: Stephanie J. Krause (for Sandra Brown – Executor)****Probate Status Hearing Re: First or Final Account**

<b>DOD: 1/18/2014</b>	<b>SANDRA BROWN</b> was appointed Executor with full IAEA without bond on 3/19/2015.	<b>NEEDS/PROBLEMS/COMMENTS</b>  <b>Minute order dated 6/23/2016 states</b> there were no appearances and continued the status hearing to 7/28/2016. The Court also issued an OSC.  <b>Please see related page 5B for OSC.</b>  1. Status report filed 7/22/2016 is verified by attorney but not by the fiduciary, Sandra Brown. (Prob C§1021, 1023)
	Letters issued 3/25/2015.	
	I&A filed 1/4/2016 shows estate valued at <b>\$115,973.96.</b>	
<b>Cont. from 062316</b>	<b>Minute order dated 3/19/2016</b> set this status hearing for filing of the first or final account.	
<b>Aff.Sub.Wit.</b>	<b>Status report filed 7/22/2016 .</b>	
<b>Verified</b>	x	
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
✓ <b>Aff.Mail</b>	w/ <b>See status report for details.</b>	
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
✓ <b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> SEF
		<b>Reviewed on:</b> 7/22/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 5A- Robinson</b>

**5A**

## Order to Show Cause

<b>DOD: 1/18/2014</b>	<b>SANDRA BROWN</b> was appointed Executor with full IAEA without bond on 3/19/2015.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from 062316</b>	Letters issued 3/25/2015.	
<b>Aff.Sub.Wit.</b>	I&A filed 1/4/2016 shows estate valued at <b>\$115,973.96.</b>	
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>	Minute order dated 6/23/2016 set this order to show cause.	
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	<b>Minute order dated 6/23/2016 states there were no appearances.</b> The Court issues an OSC to Stephanie Krause and as to Sandra Brown.	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>	<i>See case file for details.</i>	
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> SEF
		<b>Reviewed on:</b> 7/22/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 5B- Robinson</b>

**Probate Status Hearing RE: Filing First/Final Account**

<b>DOD: 3/4/14</b>	<b>MARIA GUADALUPE WARREN aka</b>	<b>NEEDS/PROBLEMS/</b> <b>COMMENTS:</b>
	<b>MARY GUADALUPE LEWIS</b> , Daughter, was appointed Executor with Full IAEA without bond on 9/16/14.	
		<b>Minute Order 3/24/16:</b> <b>Mr. Poochigian requests more time to find counsel in Texas.</b>
<b>Cont. from 111915, 032416</b>	At the hearing on 9/16/14, the Court set this status hearing for the filing of the first account or petition for final distribution.	<b>1. Need petition for final distribution per Probate Code §12200.</b>
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>	Final I&A filed 3/26/15 indicates \$986.60 cash plus three parcels of real property and minimal furniture/furnishings for a total value of \$201,086.60.	
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	<b>Status Report filed 11/18/15 states</b> the personal representative was required to commence two separate actions for unlawful detainer of two parcels to evict the occupants of the property. Such occupants have been evicted and possession has been restored to the personal representative.	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>	Among the assets of the estate is certain real property in Hidalgo County, Texas. The personal representative is in the process of engaging local counsel to assist with administration of the estate in Texas with respect to the Texas property. There are not sufficient liquid assets subject to administration in California to pay all expenses of administration, so the Texas property will need to be sold to pay such expenses.	
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>	<b>Status Report filed 3/23/16 by Mr. Poochigian states</b> the attorney in Texas was not responsive; therefore, replacement counsel has been retained. Mr. Poochigian has been in contact with the replacement counsel, who estimated that the estate in Texas may be completed within the next three months, provided that a buyer for the Texas property can be located.	
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>	<b>Status Report filed 7/25/16 states</b> it has proven difficult to obtain reputable counsel in Texas who is willing to undertake representation without requiring a deposit for legal fees. A petition for final distribution may not be filed until the Texas Real Property is sold and Texas administration is complete. As such, an additional six months is requested.	
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 7/25/16
		<b>Updates:</b> 7/26/16
		<b>Recommendation:</b>
		<b>File 6 - Reyes</b>



## Probate Status Re: Filing of the First Account or Petition for Final Distribution.

<b>DOD: 8/13/14</b>	<b>MAXINE RODRIGUEZ</b> was appointed Administrator with Limited IAEA and bond set at \$10,000.00 on 12/18/14.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need first account or petition final distribution.  2. Status Report does not indicate that it was served on all interested parties. Local Rule 7.5B requires Notice of the Status hearing along with a copy of the Status Report to be served on all necessary parties.
<b>Cont. from 042116</b>	Bond of \$10,000.00 was filed on 11/20/14.	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>	Letters issued on 12/18/14.	
<b>Inventory</b>		
<b>PTC</b>	I & A, partial no.1, filed on 2/13/15 shows a value of \$15,918.38.	
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	I & A, final, filed on 3/30/16 shows a value of \$117,500.00	
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>	<b>Minute order dated 12/18/14</b> set this status hearing for the filing of the first account or petition for final distribution.	
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>	<b>Status Report filed on 7/21/16 states</b> the real property asset of the estate is in escrow and due to close on 8/15/16. Therefore, request is made for a continuance 60 days to file the First and Final Account and Report of Administrator.	
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: KT</b>
		<b>Reviewed on: 7/25/16</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 7- Rodriguez</b>

Attorney Heather H. Kruthers (for Public Administrator)

## Probate Status Hearing Re: Filing of the Inventory and Appraisal

<b>DOD: 10/9/2014</b>		<p><b>PUBLIC ADMINISTRATOR</b> was appointed as Administrator with full IAEA authority without bond on 5/28/2015.</p> <p><b>Letters of Administration issued 6/11/2015.</b></p> <p><b>Pursuant to Probate Code § 8800(b), Final Inventory and Appraisal was filed 7/7/2016.</b></p> <p><b>Minute Order dated 5/28/2015</b> from the hearing on the petition for letters of administration set the matter for a Status Hearing on 7/28/2016 for filing of the first or account of the estate.</p> <p><b>Status Report Regarding Filing a Final Account filed 7/25/2016 states:</b></p> <ul style="list-style-type: none"> <li>The Public Administrator was appointed by Minute Order on 4/16/2015;</li> <li>All items belonging to the estate have been appraised;</li> <li>The Public Administrator intends to file a petition for instructions regarding payment of creditor's claims;</li> <li>Based upon recent filings, that petition will not be heard until September;</li> <li>To allow time to file the petition for instructions and have it heard, and prepare the documents necessary for the final account, it is respectfully requested that the next status hearing for this matter be set <b>4 months</b> from the date of this hearing.</li> </ul>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>Need first and/or final account.</li> <li>Need proof of service of notice of the Status Report Regarding Filing a Final Account filed 7/25/2016 pursuant to Local Rule 7.5(B).</li> </ol>	
<b>Cont. from 102915</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
<input type="checkbox"/>	<b>Final Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input type="checkbox"/>	<b>Notice of Hrg</b>			
<input type="checkbox"/>	<b>Aff.Mail</b>			X
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input type="checkbox"/>	<b>Letters</b>			
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
✓	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			
		<p><b>Reviewed by:</b> LEG</p> <p><b>Reviewed on:</b> 7/22/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 8 – McCoon</b></p>		

## Probate Status Hearing RE: First Account

		<b>KAYSIA BARR and KEITH BARR</b> , maternal grandmother and maternal uncle, were appointed co-guardians of the estate without bond on 4/2/2015. Monies were ordered into a blocked account.  <i>Letters issued 4/3/2015.</i>  <b>Minute order dated 3/27/2015</b> set this status hearing re: the filing of the first account.  <i>See case file for details.</i>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Minute order dated 5/19/2016</b> stated that Attorney Bagdasarian made a special appearance for counsel and requested a 60-day continuance. Matter was continued to 7/28/2016.  1. <b>Need First Account or current written status report</b> pursuant to Local Rule 7.5, which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the status report, shall be served on all necessary parties.
<b>Cont. from 051916</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>		<b>Reviewed by:</b> SEF <b>Reviewed on:</b> 7/22/2016 <b>Updates:</b> <b>Recommendation:</b> <b>File 9- Holt</b>	
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>	x		
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			

## Probate Status Hearing RE: First Account

		<b>KAYSIA BARR and KEITH BARR</b> , maternal grandmother and maternal uncle, were appointed co-guardians of the estate without bond on 4/2/2015. Monies were ordered into a blocked account.  <i>Letters issued 4/3/2015.</i>  <b>Minute order dated 3/27/2015</b> set this status hearing re: the filing of the first account.  <i>See case file for details.</i>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Minute order dated 5/19/2016</b> stated that Attorney Bagdasarian made a special appearance for counsel and requested a 60-day continuance. Matter was continued to 7/28/2016.  <b>2. Need First Account or current written status report</b> pursuant to Local Rule 7.5, which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the status report, shall be served on all necessary parties.
<b>Cont. from 051916</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>		<b>Reviewed by:</b> SEF <b>Reviewed on:</b> 7/22/2016 <b>Updates:</b> <b>Recommendation:</b> <b>File 10- Holt</b>	
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>	x		
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			

## Probate Status Hearing RE: First or Final Account

<b>DOD: 01/23/2015</b>		<p><b>WANDA JONES</b> was appointed executor with full IAEA without bond on 4/16/2016.</p> <p>Letters issued 5/4/2015.</p> <p>I&amp;A filed on 6/5/2015 shows the estate valued at \$200,000.00 (real property).</p> <p><b>Minute order dated 4/16/2015</b> set this status hearing for filing the first or final account.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b><u>OFF CALENDAR</u></b></p> <p>First account filed 7/18/2016 and set for hearing 8/23/2016.</p>
<b>Cont. from 061616</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>	x		
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			

<b>Reviewed by:</b> SEF
<b>Reviewed on:</b> 7/22/2016
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 11- Dobson</b>

Conservator: Anthony McCurn, Sr. (Pro per – Conservator)

## Probate Status Hearing RE: Filing of the Inventory and Appraisal

	<b>ANTHONY McCURN, SR</b> , spouse, was appointed conservator of the person on 4/16/2015 and of the estate with \$9,600 bond on 2/22/2016.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>Minute order dated 6/23/2016</b> states the I&A needs to be filed by 7/26/2016. The Court reminds Mr. McCurn that the first account needs to be filed no later than 7/27/2017.
<b>Cont. from 062316</b>	<b>Minute order dated 2/22/2016</b> set this status hearing for filing of the inventory and appraisal.	<b>1. Need inventory and appraisal or current written status report</b> pursuant to Local Rule 7.5, which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		<b>See case file for details.</b>
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> SEF
		<b>Reviewed on:</b> 7/22/2016
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 12- McCurn</b>

**13A In Re: Gramenz Family Living Trust Agreement Case No. 15CEPR00398**

Attorney: Steven S. Picone, (for Objectors Daniel Caballero &amp; Baldermar Martinez)

Attorney: Lisa Horton (for Petitioner Rande L Gramenz)

**Amended First Account and Report of Trustee and Petition for its Settlement**

		<b>RANDE L. GRAMENZ</b> , Successor Trustee, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 6/13/16.</b> <b>Minute order states</b> Counsel states they are in the middle of having settlement signed.
		Petitioner states settlor, Opal E. Gramenz, died on 12/28/12.	
		Account period: 12/29/12 – 6/30/15	
		Accounting - <b>\$1,575,344.83</b>	
		Beginning POH - <b>\$1,432,128.43</b>	
		Ending POH - <b>\$1,334,752.81</b>	
<b>Cont. from 090115, 101315, 011916, 032216, 051216, 062316</b>		<b>Petition states</b> pursuant to Article V section 1 of the trust he has paid his attorney \$5,000.00. Pursuant to Probate Code §15681 he is entitled to reasonable compensation from the Trust. Trust funds totaling \$14,850.00 have been used to pay Trustee's reasonable compensation for his services. This figure was derived from 1% of the total sale price (\$1,485,000) of the duplex.  <b>Petitioner states</b> the decedent has a bank account at Chase with Kenneth Caballero for the purpose of having someone available to sign checks. Kenneth Caballero was a joint owner but never signed a check, deposited or withdrew funds from the account while the Decedent was alive. All of the funds in the account on Decedent's date of death were hers. After Decedent's death, Kenneth Caballero used some of the funds to pay for funeral expenses, but kept the remaining funds. Trustee demanded the funds so that they could be deposited into the trust account but Kenneth Caballero refused. Since Kenneth Caballero kept those funds, then in the sum of those funds (\$59,494.49, after the payment of funeral expenses) will be counted as a preliminary distribution and taken from Kenneth Caballero's distributive share.  <b>Petitioner prays that the Trustee's first account and report be settled, allowed and approved as filed.</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b> W/		
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input checked="" type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
		<b>Reviewed by: KT</b> <b>Reviewed on: 7/25/16</b> <b>Updates:</b> <b>Recommendation:</b> <b>File 13A - Gramenz</b>	

**13A**

## **13A In Re: Gramenz Family Living Trust Agreement Case No. 15CEPR00398**

**Objections to Amended First Account and Report filed by Daniel Caballero and Baldemar Martinez on 8/31/15.** Objectors object to the Accounting with respect to Petitioner Trustee's assertion that the joint checking account titled in the name of Kenneth Caballero and Opal Gramenz was a Trust asset and that Kenneth Caballero's beneficial interest in the Trust should be reduced by the amounts left in the joint account at the date of Opal Gramenz's death.

Petitioner's assertion that the funds in the Chase Bank joint account are trust assets and should be counted against Kenneth Caballero's share is flatly wrong as a matter of law. As such the accounting should be revised.

Probate Code §5302 (a) establishes in pertinent part that:

"Sums remaining on deposit at the death of a party to a joint account belong to the surviving party or parties as against the estate of the decedent unless there is clear and convincing evidence of a different intent. . ."

Petitioner has not alleged, let alone proven, that Opal Gramenz and Kenneth Caballero intended for the money held in the Chase joint checking account to be distributed in a different manner other than that provided for by law.

**Wherefore, Objectors pray as follows:**

1. That the Petition to Approve the Amended Account be denied;
2. That Rande L. Gramenz be ordered to file and serve a code compliant amended accounting of the Trust within 45 days of issuance of the order;
3. For costs, and for such other and further relief as the Court deems just and proper.

**Supplemental Objections to Amended First Account, Request for Surcharge, and Removal of Trustee and Appointment of Successor Co-Trustees filed on 6/10/16.** Objectors state:

1. The Successor Trustee has failed to account for the proceeds of accounts at Wells Fargo that were titled in the name of Opal Gramenz, which proceeds were misappropriated by Rande L. Gramenz on or around March 1, 2013.
2. Petitioners repeatedly requested information from Mr. Gramenz, through counsel, regarding his authority for removing these account proceeds. Respondent, Mr. Gramenz only provided them with documents which are attached as Exhibit "A" [a document from Wells Fargo Beneficiary Services showing Rande Gramenz as beneficiary/successor to the account.] It was only after issuing a subpoena to Wells Fargo Bank that Petitioners obtained the document attached as Exhibit "B" [13100 Affidavit]. As detailed in Exhibit "B", Mr. Gramenz executed a "California Affidavit of Collection of Estate Assets" in which he averred, under penalty of perjury, that he personally was the success in interest to Decedent Opal Gramenz' interest in the accounts.
3. The Wells Fargo account proceeds rightfully belong to the Trust, sinc Opal Gramenz had executed a pour-over will on 6/30/89. Mr. Gramenz was well aware that the Wells Fargo account proceeds did not belong to him, and instead belonged to the Trust, pursuant to the pour-over will. Mr. Gramenz' actions in taking the account proceeds were therefore in bad faith under Probate Code §859.

**Please see additional page**



### **13A In Re: Gramenz Family Living Trust Agreement Case No. 15CEPR00398**

4. In executing the small estate affidavit, in failing to them marshal the Wells Fargo Bank account proceeds for the Gramenz Family Trust, in personally taking the Wells Fargo Bank proceeds, then failing to account for them to the Trust beneficiaries, Rande Gramenz breached the Trust, and violated his fiduciary duty to Petitioners as beneficiaries.
5. The proceeds of these accounts should have been accounted for, but they are not identified in the Accounting filed by Respondent. Petitioners therefore object to the Accounting on this basis, and seek other relief as set forth below.

#### **Request for Surcharge:**

A redacted copy of a Wells Fargo Statement of Accounts (attached to objections) demonstrated that as of January-February 2013 (the month following the death of Opal Gramenz) the accounts held a total of \$17,146.05. It has now been determined that Mr. Gramenz removed the contents of the Wells Fargo accounts and simply kept the proceeds.

Since Respondent Rande Gramenz is the currently acting Successor Trustee to the Trust, and is also the named Executor under the Last Will and Testament of Opal E. Gramenz, it is clear that Rande Gramenz knew that Wells Fargo Bank account proceeds were rightfully property of the Trust. As such, his taking of those account proceeds was willful and in bad faith. Pursuant to Probate Code §859, Petitioner requests that the Court surcharged Respondent, Rande Gramenz in the amount of twice the value of the property taken.

#### **Petition for Removal:**

Probate Code §16002 establishes that a Trustee has a duty to administer the trust solely in the interest of the beneficiaries.

Probate Code §16004 establishes that a Trustee has a duty not to use or deal with trust property for the trustee's own profit or for any purpose unconnected with the trust.

Probate Code §16006 establishes that a Trustee has a duty to take reasonable steps under the circumstances to take and keep control of and to preserve the trust property.

Probate Code §16061 establishes that a Trustee has a duty to report to a beneficiary by providing requested information relating to the administration of the trust relevant to the beneficiary's interest.

Respondent Rande Gramenz violated all of the foregoing duties by taking property which was rightfully belonged to the Trust for his own use and benefit, and by then failing to acknowledge that he had done so. The Petitioners ultimately only confirmed that Rande Gramenz had taken Trust property with the use of a small estate affidavit from Wells Fargo Bank pursuant to a subpoena.

Since the Trustee has misappropriated money belonging to the Trust, and has attempted to cover up his actions in this regard by failing to acknowledge what he had done to the beneficiaries, the Trustee should be removed.

**Please see additional page**

**Petition Appointment of Successor Co-Trustees:**

The Trust provides that upon the death, resignation or inability to act of Rande L. Gramenz, Cupertino National Bank of Cupertino, California, shall act as sole Successor Trustee.

Unfortunately, Cupertino National Bank is no longer in existence. Petitioners therefor respectfully request that they be appointed as successor Co-Trustees.

**Wherefore, Objectors pray for the following:**

1. That the Petition to Approve the Amended Account be denied;
2. That Successor Trustee be surcharged for the amounts taken by him from the Wells Fargo Accounts and the Franklin Templeton Investments IRA;
3. That Successor Trustee be additionally surcharged under Probate Code §859;
4. That the Court issue and order removing Rande L. Gramenz as Successor Trustee of the Gramenz Family Living Trust;
5. That the Court issue and Order appointing Daniel Caballero and Baldemar Martinez as Successor Co-Trustees of the Gramenz Family Living Trust.
6. For attorney's fees and costs, and for such other and further relief as the Court deems just and proper,

**13B In Re: Gramenz Family Living Trust Agreement Case No. 15CEPR00398****Attorney: Steven S. Picone, (for Objectors Daniel Caballero & Baldermar Martinez)****Attorney: Lisa Horton (for Petitioner Rande L Gramenz)****Probate Status Hearing: Resolution**

	<b>RANDE L. GRAMENZ</b> , Successor Trustee, filed an Amended First and Final Account and Report of Trustee.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 6/23/16.</b> Minute order states Counsel states they are in the middle of having a settlement signed.
	<b>Daniel Caballero</b> and <b>Baldemar Martinez</b> filed objections to the accounting.	
Cont. from 011916, 032216, 051216, 062316	Minute order dated 10/13/15 set this status hearing.	<b>1. Need current written status report</b> pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Aff.Sub.Wit.		
Verified		
Inventory		
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Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<b>Reviewed by:</b> KT
		<b>Reviewed on:</b> 7/25/16
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 13B- Gramenz</b>

**13B**

Attorney Janet L. Wright (for Administrator Anthony P. DiEgidio)

## Probate Status Hearing Re: Filing of the First or Final Account

<b>DOD: 3/21/2015</b>	<b>ANTHONY P. DIEGIDIO</b> , father, was appointed Administrator with Full IAEA authority without bond on 5/28/2015. Letters issued on 5/29/2015.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  3. Need first and/or final account.
<b>Cont. from</b>	<b>Pursuant to Probate Code § 12200</b> , first account and/or petition for final distribution was due <b>5/29/2016</b> .	
<b>Aff.Sub.Wit.</b>	<b>Minute Order dated 5/28/2016</b> from the hearing on the petition for letters of administration set this status hearing on 7/28/2016 for the filing of the first and/or final account.	
<b>Verified</b>		
<b>Inventory</b>	<b>Status Report of Counsel for Administrator filed 7/25/16 states:</b>	
<b>PTC</b>		
<b>Not.Cred.</b>	<ul style="list-style-type: none"> <li>The Administrator has completed his accounting and expects to file his Petition requesting Court approval of the accounting and various administrative matters addressing the estate's liquidity problems on or shortly after 7/28/2016;</li> <li>All assets of the estate have been reported on Inventory and Appraisals; the primary assets of the estate are Decedent's residence and Decedent's minority interest in three (3) limited liability companies organized and operated in Delaware;</li> <li>The residence is subject to a mortgage in excess of the fair market value and the Administrator is currently attempting to finalize a short sale in order to mitigate potential income tax liability; the minority interest in the limited liability companies (which were gifted to the Decedent by his father shortly before the Decedent's death) are subject to transfer restrictions in the Operating Agreements.</li> <li>The Administrator sent Notices of Proposed Action outlining his intention to redeem all of the limited liability company units in compliance with the transfer restrictions set forth in the Operating Agreements of each limited liability company; there were Objections to the proposed redemptions as set forth in the Notices of Proposed Action; the Administrator's Petition will address this issue, among others, which effect the estate's liquidity and ability to close at this time.</li> </ul>	
<b>Notice of Hrg</b>		
✓ <b>Aff.Mail</b>		<b>Reviewed by: LEG</b>
<b>Aff.Pub.</b>		
✓ <b>Sp.Ntc.</b>		<b>Reviewed on:</b>
<b>Pers.Serv.</b>		7/22/16
<b>Conf. Screen</b>		<b>Updates: 7/25/16</b>
<b>Letters</b>		<b>Recommendation:</b>
<b>Duties/Supp</b>		File 14- DiEgidio
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
✓ <b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		

## Probate Status Hearing RE: Filing of the Final Account

<b>DOD: 11/2/2014</b>		<p><b>The FRESNO COUNTY PUBLIC ADMINISTRATOR</b> was appointed on 7/16/15. (Letters issued 2/11/16.)</p> <p><b>History:</b> Carl Johnston, Father, filed a petition for letters of administration on 4/30/16 that alleged possible real property that was not in the decedent's name at her death. Mr. Johnston intended to pursue litigation, if necessary, to recover the asset(s).</p> <p>At a continued hearing on 7/16/15, the Court appointed the Public Administrator due to substantial disagreement and originally set status hearings for 12/10/15 for the filing of the Inventory and Appraisal and for 10/13/16 for the filing of the first account or petition for final distribution.</p> <p>On 12/10/15, counsel reported that the estate is too small to litigate, and they were working on a possible resolution.</p> <p>At a continued status hearing re the filing of the Final I&amp;A on 5/19/16, the Court confirmed the appointment of the Public Administrator and set this sooner status hearing re the filing of the final account.</p> <p><b>Minute Order 5/19/16 states:</b> The Court is not going to allow the PA to step down; Ms. Kruthers requests 60 days.</p> <p><u>Note:</u> Partial I&amp;A filed 2/16/16 consisted of \$19,304.59 cash. Final I&amp;A filed 7/12/16 consisted of two vehicles, total \$4,000.00. Total I&amp;A: \$23,304.59.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. Need first account or petition for final distribution or written status report pursuant to Local Rule 7.5.</p>
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			

<b>Reviewed by:</b> skc
<b>Reviewed on:</b> 7/25/16
<b>Updates:</b>
<b>Recommendation:</b>
<b>File 15- Johnston</b>

<b>DOD: 07/05/2015</b>	<b>PUBLIC ADMINISTRATOR</b> , was appointed Successor Administrator, pursuant to minute order of 05/19/2016. Letters issued on 07/15/2015.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from</b>	<b>MARILYNN DE LA CRUZ CASTILLO</b> , daughter, was previously appointed Administrator with full IAEA authority and bond set at \$500,000.00 on 10/15/2015. Pursuant to minute order of 05/19/2016 she was removed and the Public Administrator was appointed.	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>	<b>Minute Order of 05/19/2016</b> set this Status Hearing for the filing of the Report from the Public Administrator.	
<b>Aff.Mail</b>	<b>Minute Order of 05/19/2016</b> states the Court orders Marilyn Castillo removed as Administrator of the estate and appoints the Public Administrator with the understanding that the Public Administrator would not be running the Central Valley Sales Business and would work with the heirs to find a third party administrator for the business. Letters are to issue forthwith from the minute order.	
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>	<b>Status Report from Public Administrator filed 07/25/2016</b> states the decedent had seven children, one of whom is Marilynn Castillo. She was running the business after her father died. She has cooperated fully with the PA after she was removed as Administrator, including turning over all materials. The Court directed the PA to have someone evaluate whether the business was viable and should continue operating. Attorney Gary Bagdasarian recommended John Van Curren, who toured the business site. He determined that the business is not viable and the items and the real property should be sold. There are five parcels of property and seven vehicles, in addition to the personal property of the business. The PA proposes to sell all items and distribute the proceeds equally to all the decedent's children. She requests that this matter be treated as a new case, and have new status hearings set.	
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by: LV</b>
		<b>Reviewed on: 07/25/2016</b>
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 16- Castillo</b>



## Status Re Filing of the Bond

		DEBRA WEED, daughter was appointed conservator of the person and estate on 6/29/2016.	NEEDS/PROBLEMS/COMMENTS:
		Minute order dated 6/29/2016 set this status hearing for filing of the bond.	<p align="center"><b><u>OFF CALENDAR</u></b></p> <p align="center">Bond of \$85,000 filed 7/22/2016.</p>
Cont. from			
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: SEF
			Reviewed on: 7/22/2016
			Updates:
			Recommendation:
			File 18- Weed



Attorney Susan A. Hemb (for Petitioner Christine Jones, half-sister)

## Petition for Appointment of Guardian of the Person

		TEMPORARY EXPIRES 7/14/2016; extended to 7/28/2016	NEEDS/PROBLEMS/COMMENTS:
		KAYLA THOMPSON, proposed ward, and CHRISTINE JONES, half-sister, are Petitioners and request CHRISTINE JONES be appointed as Guardian of the Person.	Continued from 7/14/2016. (No issues remain to be addressed.)
Cont. from 071416		~Please see Petition for details~	Note: Minute Order dated 5/26/2016 from the temporary hearing, and the Order Appointing Temporary Guardian filed 5/26/2016, both state that the Court orders that there shall be no visitation for Theresa Pilkington, mother, until she appears before the Court.
	Aff.Sub.Wit.		
✓	Verified	Court Investigator's Report was filed on 6/29/2016.	
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 7/22/16
			Updates:
			Recommendation:
			File 19- Thompson

Petitioner: Kathalene Kae Kodman, (Pro per – Mother)

## Petition for Appointment of Probate Conservator

		<b><u>NO TEMPORARY REQUESTED</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>KATHALENE KAE KODMAN</b> , mother, is petitioner and requests appointment as conservator of the person  <i>See petition for details.</i>	<b>Court Investigator advised rights on 6/15/2016.</b>  1. Proof of service of <i>Notice of Hearing</i> filed 7/21/2016 shows Central Valley Regional Center was served with only 28 days versus 30 days notice required by Prob C§1822.	
Cont. from 062316				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w/
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			w/
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
			Reviewed by: SEF	
			Reviewed on: 7/22/2016	
			Updates:	
			Recommendation:	
			File 20- Hinkle	

## Petition for Appointment of Probate Conservator

		<b><u>NO TEMPORARY REQUESTED</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		MICHAEL COLE WILLEY, father, is petitioner.	<b>Continued to 8/18/2016</b> @ request of petitioner	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			<input type="checkbox"/>
<input type="checkbox"/>	Verified			<input type="checkbox"/>
<input type="checkbox"/>	Inventory			<input type="checkbox"/>
<input type="checkbox"/>	PTC			<input type="checkbox"/>
<input type="checkbox"/>	Not.Cred.			<input type="checkbox"/>
<input type="checkbox"/>	Notice of Hrg			<input type="checkbox"/>
<input type="checkbox"/>	Aff.Mail			<input type="checkbox"/>
<input type="checkbox"/>	Aff.Pub.			<input type="checkbox"/>
<input type="checkbox"/>	Sp.Ntc.			<input type="checkbox"/>
<input type="checkbox"/>	Pers.Serv.			<input type="checkbox"/>
<input type="checkbox"/>	Conf. Screen			<input type="checkbox"/>
<input type="checkbox"/>	Letters			<input type="checkbox"/>
<input type="checkbox"/>	Duties/Supp			<input type="checkbox"/>
<input type="checkbox"/>	Objections			<input type="checkbox"/>
<input type="checkbox"/>	Video Receipt			<input type="checkbox"/>
<input type="checkbox"/>	CI Report			<input type="checkbox"/>
<input type="checkbox"/>	9202			<input type="checkbox"/>
<input type="checkbox"/>	Order			<input type="checkbox"/>
<input type="checkbox"/>	Aff. Posting	<input type="checkbox"/>		
<input type="checkbox"/>	Status Rpt	<input type="checkbox"/>		
<input type="checkbox"/>	UCCJEA	<input type="checkbox"/>		
<input type="checkbox"/>	Citation	<input type="checkbox"/>		
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>		
			Reviewed by: SEF	
			Reviewed on: 7/25/2016	
			Updates:	
			Recommendation:	
			File 21- Willey	

## Petition for Appointment of Probate Conservator

		<b><u>NO TEMPORARY REQUESTED</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		MICHAEL COLE WILLEY, father, is petitioner.	<b>Continued to 8/18/2016</b> @ request of petitioner
Cont. from			
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: SEF
			Reviewed on: 7/25/2016
			Updates:
			Recommendation:
			File 22- Willey

## Petition for Appointment of Probate Conservator

		<b><u>NO TEMPORARY REQUESTED</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		MICHAEL COLE WILLEY, father, is petitioner.	<b>Continued to 8/18/2016</b> @ request of petitioner	
Cont. from				
	Aff.Sub.Wit.			
	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: SEF	
			Reviewed on: 7/25/2016	
			Updates:	
			Recommendation:	
			File 23- Willey	

Attorney Leigh W. Burnside (for Petitioner Rhonda M. Gaeta)

## Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under the IAEA

<b>DOD: 4/27/2016</b>		<b>RHONDA MAUREEN GAETA</b> , daughter, and named Executor without bond, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
			<b>Note:</b> Court will set Status Hearings as follows:
<b>Cont. from</b>		Full IAEA: OK	<ul style="list-style-type: none"> <li>Thursday, January 12, 2017 at 9:00 a.m. in Dept. 303 for the filing of the final inventory and appraisal; and</li> <li>Thursday, September 28, 2017 at 9:00 a.m. in Dept. 303 for the filing of the first account and/or petition for final distribution.</li> </ul>
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	S/P	
<input checked="" type="checkbox"/>	<b>Verified</b>		Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	W/	
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

Full IAEA: OK

Will Dated: 1/31/2012

Residence: Fresno

Publication: Business Journal

**Estimated value of the Estate:**

Real property - \$477,000.00

Personal property - \$311,000.00

**Total** - \$788,000.00

Probate Referee: Rick Smith

Reviewed by: LEG

Reviewed on: 7/22/16

Updates:

Recommendation: SUBMITTED

File 24- Nutt

**25 In the Matter of Brian Jacob Lande and Melissa Annette Carleton**  
**Case No. 16CEPR00720**

**Attorney John Hastrup (for Brian Jacob Lande, Conservator of the Person and Estate)**

**Petition for Approval of Transaction Involving Community Property Where  
 One Spouse Lacks Capacity**

		<b>BRIAN JACOB LANDE</b> , spouse and Conservator of the Person and Estate of <b>MELISSA ANNETTE CARLETON</b> appointed on 8/25/2016 in Case 16CEPR00606, is Petitioner.  <p align="center"><i>~Please see Petition for details~</i></p>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u><b>Note Re Related Case:</b></u> <i>Minute Order</i> dated 10/21/2015 from the status hearing for the filing of the first and/or final account of the <i>Conservatorship of Melissa Annette Carleton</i> , Case 16CEPR00606, states the Court agrees that no formal accounting needs to be filed, and grants the request that a separate inventory and appraisal not be filed.  1. Court may require Petitioner to provide legal authority for a Court determination that Petitioner may use community property funds to purchase real property with title held solely in Petitioner's name without any real property or other interest from the community property investment to be held by his conserved spouse.	
<b>Cont. from</b>				
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
✓	<b>Notice of Hrg</b>			
✓	<b>Aff.Mail</b>			W/
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>			
	<b>Conf. Screen</b>			
	<b>Letters</b>			
	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>			
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
		<b>Reviewed by:</b> LEG		
		<b>Reviewed on:</b> 7/25/16		
		<b>Updates:</b>		
		<b>Recommendation:</b>		
		<b>File 25- Lande/ Carlton</b>		

**Petitioner**            **Lozano, Jorge Ulloa (Pro Per Petitioner)**

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:	
				1. Need Notice of Hearing.	
				2. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) <u>or</u> consent and waiver of notice on: - Jorge Jose Lozano Velasquez, Jr. (minor)	
	Aff.Sub.Wit.				
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
	Notice of Hrg	x			
	Aff.Mail				
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.	x			
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
✓	Order				
	Aff. Posting		Reviewed by: skc		
	Status Rpt		Reviewed on: 7/26/16		
✓	UCCJEA		Updates:		
	Citation		Recommendation:		
	FTB Notice		File 26- Jimenez/ Velasquez		



Petitioner Padilla, Mary Helen (Pro Per – Mother)

Petition for Appointment of Probate Conservator

Age: 54		<p align="center"><b><u>NO TEMPORARY REQUESTED</u></b></p> <p>MARY HELEN PADILLA, mother, is petitioner.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>Minute Order of 07/21/2016: Video Receipt needs to be filed.</p>	
Cont. from 072116				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w/
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			x
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 07/25/2016</p> <p><b>Updates:</b> 07/26/2016</p> <p><b>Recommendation:</b></p> <p><b>File 27- Padilla</b></p>				